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Foreign Crops and MARKETS



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Grain Prospects Favorable in Canada's Prairie Provinces (Page 45)

Slight Rise in Egyptian Cotton Acreage (Page 52)

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U. S. DEPARTMENT OF AGRICULTURE

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L A T E N E W S

The crop outlook in Canada's Maritime Provinces is promising. Haying is underway with good yields, and potatoes and other root crops are developing well. Cereal crop prospects in Quebec have improved, and pasture growth is abundant. In Ontario recent rains revived pastures but retarded haying. Tobacco and late crops are growing well. Spring grain prospects are poor, especially in eastern Ontario. The over-all crop outlook in the Prairie Provinces has deteriorated somewhat. Timely rains could alleviate situation in many dry sections. Moisture supplies in British Columbia generally good. Haying is almost completed, and the harvesting of fall grains has commenced. Spring grains and second cut alfalfa is developing rapidly. Apricots are moving in volume.

The United Kingdom slaughtered 12,744 animals and paid a total compensation of £34,381 (\$1,346,625), because of outbreaks of foot-and-mouth disease for the year ending June 19, according to the Minister of Agriculture.

Haiti's 1946-47 cotton crop is estimated at 7,700 bales (of 500 pounds gross) compared with 11,300 last year. The decrease is attributed to excessive rainfall and boll weevil damage. Colombia has been the principal export market for Haitian cotton in recent years, but no significant quantities of the new crop have been exported this year.

Imports of cotton into China during the year ended June 30, 1947 totaled 839,000 bales (of 500 pounds gross), 228,000 of which arrived in April, May and June. The total for the fiscal year included 529,000 bales from the United States, 187,000 from India, 59,000 from Brazil, 23,000 from Egypt, and 7,000 from Afghanistan.

Hungarian grain crop prospects are good. Reports are that rainfall in the last half of June aided the heading of grain. The harvest is now in progress, and some of the new grain crop is arriving in Budapest. Official sources have acknowledged the great value of United States wheat received in time to tide the Hungarian population over the last month prior to the harvest.

COMMODITY DEVELOPMENTS

FATS AND OILSCHILE'S WHALE OIL
PROSPECTS BRIGHT

Chile's 1947 whale oil output is expected to increase considerably over the 1946 production of 3,290 short tons. The January-April outturn reached 1,330 tons. This rapid expansion is the result of the Chilean whaling company's recent acquisition of several modern catcher boats, placing 6 in operation compared with only 3 during most of 1946, as well as the improvement of plant installations.

Last year's output of sperm whale oil amounted to 2,342 tons and of baleen whale oil 948 tons, totaling 3,290 compared with 3,810 in 1945, in spite of a 23 percent increase in whale catch the past year.

Because of the pronounced scarcity of fats and oils in Chile, none of the 1946 whale oil output was exported, and it is possible that no exportable surplus will be available this year.

Chile: Whale oil production, January-April
1947, with comparisons

Whale oil	:	1944	:	1945	:	1946	:	Jan.-April 1947
	:	Short tons						
Baleen	:	187.9	:	867.7	:	947.7	:	384.0
Sperm	:	2,395.2	:	2,942.3	:	2,342.3	:	946.2
Total	:	2,583.1	:	3,810.0	:	3,290.0	:	1,330.2
	:		:		:		:	

American Embassy, Santiago

CHINA'S SUMMER
OILSEED ACREAGE DOWN

China's summer oilseed plantings for 1947 total approximately 40,000 acres less than in 1946, according to the first official estimate. The soybean area, the only one showing an increase, amounts to 9,989,000 acres compared with 9,968,000 (final estimate) last year. Peanut plantings decreased from 3,279,000 acres in 1946 to 3,226,000 this year and sesame seed from 3,133,000 to 3,126,000 acres.

NETHERLANDS REDUCES OILSEED ACREAGE

Acreage devoted to 1947 oilseed crops in the Netherlands is down 4 percent, or approximately 2,500 acres from 1946, principally the result of smaller rapeseed plantings. Only 1,700 acres were utilized for this crop compared with the record of 120,000 acres attained in 1944 under German supervision. Since then the rapeseed area was reduced drastically to 86,000 in 1945, 10,000 in 1946 and to the present low of 1,700 acres. The prewar area was slightly over 4,000.

Poppy seed is down to 14,000 acres from 16,000 last year. This is, however, 370 percent greater than the 1935-39 average. Unusually dry weather in May and early June damaged the crop to the extent that some acreage had to be resown. The mustard seed area is placed at 4,700 acres, compared with about 5,400 in 1946 and the prewar average of 2,500.

The greatest increase occurred in caraway seed with plantings of almost 10,000 acres, a 240 percent increase over the 2,900 planted a year ago. Flax acreage is up slightly, 32,300 acres compared with 31,000 in 1946. This is the largest area seeded to this crop since 1943, but is still approximately 24 percent smaller than the 1935-39 average. After a prolonged cold winter growing conditions were excellent in April, but the severe drought in May and early June adversely affected the flax crop. Its mid-June position, however, was up to the past 10 year average.

CANADA INCREASES FLAXSEED ACREAGE

According to a preliminary report released by the Dominion Bureau of Statistics, 1,414,000 acres have been sown to flaxseed in the Prairie Provinces of Canada. This forecast, based on the annual June survey, is 72 percent above the revised estimate for 1946. The largest percentage increase is in Alberta where the condition was slightly less favorable than a year ago. In the two important producing provinces of Saskatchewan and Manitoba, however, June 30 condition figures were 10 and 16 percent, respectively, above the corresponding date in 1946.

PHILIPPINE COPRA EXPORTS REACH ALL-TIME HIGH

Philippine Island copra exports for the year ended June 1947 totaled approximately 1,050,000 short tons, a record for any 12 months period. Pre-war (1935-39 calendar year) exports of copra and coconut oil in terms of copra amounted to 623,000 tons.

(Continued on page 55)

GRAINS, GRAIN PRODUCTS AND FEEDCANADA'S PRAIRIE PROVINCES
GRAIN PROSPECTS FAVORABLE

Wheat acreage in the Prairie Provinces of Canada is slightly smaller than the 1946 acreage, but coarse grain acreage is somewhat larger, according to the Dominion Bureau of Statistics' annual June survey of seeded acreage.

Wheat acreage in the three Provinces is placed at 22,992,000 acres compared with 23,354,000 acres in 1946 (revised on basis of Census figures). Present estimates confirm the shifts indicated by farmers' intentions to plant as of April 30, when a reduction in intended seedings of wheat and oats but a substantial increase in barley was reported. Land in summer-fallow is estimated to be 5 percent less than in 1946. Canada's acreage of mixed grains and corn for grain show substantial declines, while some increase in buckwheat is noted.

The greater part of the wheat reduction occurred in Alberta, where acreage is 5 percent below the 1946 area. No change is reported for Saskatchewan, where over 60 percent of the Prairie Provinces' wheat acreage is found, and only a minor reduction in Manitoba.

The area seeded to oats in the three Provinces, reported at 7.9 million acres, is about 7 percent below the 1946 acreage in those Provinces. Saskatchewan and Alberta together account for the bulk of the reduction. Barley production, at 7 million acres, is 1.2 million acres, or more than 20 percent above last year's acreage. This is, with one exception, the largest barley acreage ever reported for this area. Significant increases are reported for all three Provinces, but largest increases are in Alberta and Saskatchewan.

Both fall and spring rye acreages are considerably larger than in 1946, with fall rye 92 percent above the 1946 level, and more than double in the important producing Province of Saskatchewan. Spring rye shows little increase in that Province but has more than doubled in Alberta.

Preliminary estimates of late-sown grain crops for the entire Country show a more than 20 percent reduction in the mixed grain and some reduction in the acreage of corn grown for grain. The acreage of mixed grains is placed at 1,024,000 acres, compared with 1,318,000 a year ago. Most of the decline occurred in Ontario, where about 70 percent of the Country's total is seeded. Second in importance for mixed grains is Quebec, with the reduction from last year's acreage placed at about 10 percent. Reductions in area of these spring seeded grains, grown principally in eastern Provinces was caused by unfavorable weather at seeding time. As a result

of seeding delays, most grains in the East are less advanced than usual for this time of year. Acreage of corn for grain is 216,000 acres or about 15 percent below the 1946 area. Buckwheat acreage, placed at 263,000 acres is about 20 percent larger than a year ago. The increase in this late-sown crop is attributed to curtailed acreage of earlier sown grains because of bad weather.

Canada: Seeded acreage of principal grain crops and summer-fallow in the Prairie Provinces, 1947 with comparisons

Province	Wheat	Oats	Barley	Rye	Flaxseed	Summer-fallow
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: acres	: acres	: acres	: acres	: acres	: acres
Manitoba:	:	:	:	:	:	:
1947	: 2,497	: 1,381	: 1,903	: 40	: 556	: 2,187
1946 a/	: 2,522	: b/1,439	: 1,697	: 21	: 304	: 2,573
1947 as percent of 1946	: 99	: 96	: 112	: 190	: 183	: 85
Saskatchewan:	:	:	:	:	:	:
1947	: 14,085	: 3,983	: 2,780	: 704	: 601	: 11,480
1946 a/	: 14,085	: 4,329	: 2,317	: 406	: 455	: 11,835
1947 as percent of 1946	: 100	: 92	: 120	: 173	: 132	: 97
Alberta:	:	:	:	:	:	:
1947	: 6,410	: 2,534	: 2,354	: 328	: 257	: 5,773
1946 a/	: 6,747	: 2,754	: 1,783	: 214	: 62	: 6,014
1947 as percent of 1946	: 95	: 92	: 132	: 153	: 415	: 96
Prairie Provinces:	:	:	:	:	:	:
1947	: 22,992	: 7,898	: 7,035	: 1,072	: 1,414	: 19,440
1946 a/	: 23,354	: 8,522	: 5,797	: 641	: 821	: 20,422
1947 as percent of 1946	: 98	: 93	: 121	: 167	: 172	: 95

Compiled from reports of the Dominion Bureau of Statistics

a/ Preliminary figures from quinquennial Census of the Prairie Provinces.

b/ Includes small acreage of oats for hay or summer feeding.

The condition of the principal grain crops on June 30 was generally better than on that date of 1946. Spring wheat condition, expressed as a percentage of the long-time average yield per acre, was placed at 125, or 3 points higher than a year earlier. In the main producing area prospects were best in Saskatchewan, with condition placed at 127 percent, compared with 123 in 1946. In Alberta, where the outlook was least favorable, the condition was placed at 123 percent, or 4 points below the figure a year ago. Manitoba's condition figure of 126 is, in contrast, 23 points higher than the figure a year ago. Above-average pre-seasonal rains and generally satisfactory spring rainfall are reflected in the above-average condition figures. Moisture deficiencies are reported over considerable areas in the Prairie Provinces, however, and rains are urgently needed for the crop's further development in those areas.

Prospects for feed grains are good in the Prairie Provinces but poor in eastern areas, especially in Ontario, because of unfavorable weather. For the country as a whole the condition of barley is better than in 1946, (91 percent compared with 84), and total rye at 87 is a point above last year's condition. Other grain crops are below last year's condition. Numerical condition of these crops, expressed in percentage, is as follows, with condition for last year in parentheses: Oats 88 (89), buckwheat 87 (94), and mixed grains 74 (96).

TROPICAL PRODUCTS

BRAZIL'S COFFEE EXPORTS BELOW LAST YEAR

During the first 6 months of 1947 Brazil exported 6.4 million bags of coffee compared with 7.6 for the same period last year. Exports to the United States declined from 5.8 million bags during the first half of 1946 to 3.9 million bags in 1947. Although comparable quantities sent to Europe increased from 1.2 million bags to 1.8 million bags, the increase was not sufficient to offset the drop in United States takings.

Reports indicate that the 3-day frost occurring in North Parana and Sao Paulo States, July 9-11, did little or no damage to either the current crop or that of next season's. The 1947-48 exportable production in Sao Paulo, Brazil's principal coffee-producing State, has been forecast at 8.4 million bags (Foreign Crops and Markets, June 30, 1947).

Country or continent	January - June		
	1947 a/	1946	1945
	1,000 bags b/	1,000 bags b/	1,000 bags b/
United States	3,904	5,808	5,255
Canada	21	82	4
Other Western Hemisphere	389	420	322
Belgium	291	290	120
Denmark	145	117	-
France	371	-	-
Finland	69	40	-
Italy	84	50	-
Netherlands	149	84	-
Norway	12	93	-
Spain	184	12	-
Sweden	260	253	72
United Kingdom	189	33	26
Other Europe	106	199	13
All others	240	170	4
TOTAL	6,414	7,651	5,816

a/ Preliminary. b/ Bags of 132 pounds.

Official statistics and foreign service reports.

GOLD COAST CACAO CROP
BELOW 1945-46

Nearly all the cacao suitable for export from the 1946-47 Gold Coast main crop, about 381 million pounds, has been shipped. The midcrop, harvesting of which is now in progress, is estimated at 33.6 million pounds, bringing the total 1946-47 production to about 415 million pounds. This compares with an estimated 1945-46 production of 504 million pounds. This year's smaller production is attributed to the effects of droughts and disease. Prospects are somewhat better for the 1947-48 main crop, as weather conditions have been more favorable.

Exports of cacao beans from the Gold Coast from January through May, 1947, amounted to 248.8 million pounds, destined as follows: United States 85.3 million pounds, United Kingdom 84.4, other Europe 43.3, Australia and New Zealand 22.6, and all other countries 13.2 million pounds.

FRUITS, VEGETABLES AND NUTS

CANADIAN APPLE
PROSPECTS DOWN

Early prospects indicate a crop of about 16 million bushels of apples in Canada in 1947 as compared with the final 1946 estimate of 19.3 million bushels. British Columbia is expected to produce about 7.7 million bushels as compared with 9.9 million in 1946; Nova Scotia 4.2 million against 6 million and Ontario 2.9 million this year compared with 2 million last season. In 1946 Quebec produced 1 million bushels and New Brunswick 330,000.

The 1946 Canadian apple crop of 19,282,000 bushels compares with the previous record of 17,829,000 bushels produced in 1944. Of the total marketings of 19,282,000 bushels, 7,887,000 bushels were sold for domestic fresh use, 5,409,000 bushels were processed in Canada and 5,986,000 bushels were exported.

The United Kingdom received 4.5 million or 75 percent of the total exports of 6 million bushels. Exports to the United States totaled one million bushels, all but 7,500 of the latter originating in British Columbia. About 60 percent of the Canadian exports to the United States were packed apples for fresh use distributed in 33 States, the remaining 40 percent bulk apples for processing in Washington, Oregon, and California. In turn, the apple industry of the United States exported to Canada about 355,000 bushels between July 1, 1946 and May 31, 1947.

LARGER CITRUS CROP
EXPECTED IN PALESTINE

The 1947-48 production of citrus fruits in Palestine is expected to total 12,000,000 to 14,000,000 boxes, according to preliminary estimates,

as compared with 10,790,000 boxes marketed during the 1946-47 season.

Of the total marketings during the past season Jaffa oranges accounted for 8,286,000 boxes, Valencias 913,000, grapefruit 1,238,000 and lemons 353,000 boxes.

European countries purchased 5,701,000 boxes of Jaffa oranges, 753,000 Valencias, 953,000 grapefruit and 203,000 boxes of lemons and other countries, chiefly Syria and Trans-Jordan, received the remaining exports consisting of 335,000 boxes of Jaffas, 10,000 Valencias and 30,000 boxes of lemons. Of the European sales the United Kingdom received 4,038,000 boxes of Jaffas, 565,000 Valencias, 326,000 grapefruit and 203,000 boxes of lemons; Belgium 626,000 Jaffas, 124,000 Valencias and 86,000 boxes of grapefruit; Sweden 338,000 Jaffas, 29,000 Valencias and 2,000 boxes of grapefruit; Norway 280,000 boxes of Jaffas; Eire 187,000 Jaffas, 39,000 Valencias and 22,000 boxes of grapefruit; Czechoslovakia 113,000 boxes of Jaffas; Netherlands 115,000 Jaffas and 5,000 boxes of Valencias and Switzerland 4,000 boxes of Jaffa oranges and 17,000 boxes of grapefruit.

Local markets consumed 750,000 boxes of Jaffa oranges, 150,000 Valencias, 85,000 grapefruit and 40,000 boxes of lemons. Processors used 1,500,000 boxes of Jaffas, 200,000 of grapefruit and 80,000 boxes of lemons.

Considerable loss of fruit exported to European countries is reported and cancellation by the British Ministry of Food of an order for approximately 1,000,000 boxes of oranges is attributed to such losses. Compulsory use of diphenyl wraps was ordered for exports to Britain of Jaffa oranges beginning mid-February and Valencias after March 10.

Representative of the Palestine Citrus Marketing Board are reported to be in London negotiating with the Ministry of Food for sale of fruit and fruit products from the 1947-48 crop.

(Continued on Page 53)

LIVESTOCK AND ANIMAL PRODUCTS

NETHERLANDS HOG PRODUCTION DOWN

Hog numbers in Netherlands, as of May 1947, are reported at 854,914 head, which is 18 percent below 1946 and only 55 percent of 1939. Reduction in numbers has occurred because of shortage of feedstuffs and is causing official concern over the winter meat position. There is very little likelihood that the present weekly meat ration of 150 grams will be increased before fall slaughter starts. Present shortage of foreign exchange precludes the importation of meat.

Further restrictions have been announced by the Netherlands Government on the farm use of grain for livestock feeding purposes. The number of pigs which may be kept for self supply is strictly limited. Special

permits are issued to the farmer or farm laborer, depending on the amount of acreage farmed and size of family. All meat ration coupons, however, must be surrendered.

WORLD DRY MILK
PRODUCTION IN 1946

The world production of non-fat dry milk solids and dry whole milk production in 1946 for human consumption was slightly below that for the previous year. The output, however, was more than double prewar production. The United States produced about 80 percent of the entire world output of 1946. Production was resumed in the Netherlands, and the output in Europe was about three-fourths of prewar levels. Canada, Australia, Denmark, Argentina and New Zealand are all producing more dry milk than in the prewar period 1934-38.

Production of Non-Fat Dry Milk Solids and Dry Whole Milk for Human Consumption in Specified Countries: 1934-38 average; 1945; 1946.

Country	1934-38	1945	1946
	Million pounds	Million pounds	Million pounds
United States	254	a/ 860	817
Canada	23	a/ 52	58
North America	277	912	875
United Kingdom	34	60	63
Eire	2	N.A.	N.A.
Belgium	6	2	4
Denmark	2	N.A.	14
Netherlands	56	N.A.	30
France	8	N.A.	N.A.
Sweden	1	N.A.	N.A.
Switzerland	2	7	6
Germany	39	N.A.	N.A.
Italy	6	N.A.	N.A.
Europe	156	69	117
Australia	17	b/ 33	c/ 39
New Zealand	17	28	d/ N.A.
Argentina	N.A.	11	13
Southern Hemisphere	34	72	52
Total	467	1,053	1,044

N.A. Not available. a/ Revised. b/ Does not include 14 million pounds infants' and health foods, etc. c/ Does not include 16 million pounds infants' and health foods, etc. d/ Dry milk production is now reported with condensed and evaporated milk.

GUATEMALA IMPORTS FOUNDATION
LIVESTOCK BY PLANE

Over 50 head of foundation livestock were shipped by airplane from Houston, Texas to Guatemala the latter part of May. These shipments consisted of Holsteins, Jerseys, Santa Gertrudis, Zebus or Brahman, Brown Swiss, and Red Polls. Each C-47 plane carried from six to ten head, depending upon the age and weight or whether they had to be placed in crates or pens.

All of the animals transported in seven shipments arrived in good condition. The flights were non-stop, which enabled the ships to avoid complications on account of the foot-and-mouth disease in Mexico. Shipments arrived in less than eight hours after planes took off. A month to six weeks would have been required if these animals had been shipped by rail and boat. Guatemalans are enthusiastic about the introduction of improved livestock and the prospects are now that there will be many more shipments.

GUATEMALA TO EXPORT
FROZEN BEEF

The Government of Guatemala has announced the issuance of export permits to cover shipment of 2,000 head of beef cattle in the form of frozen carcasses to European points, probably England. These cattle will be purchased from the Guatemalan Livestock Producers Cooperative by the Municipality of Guatemala and then slaughtered for an exporting firm known as the Guatemalan-American Company of Delaware.

Deliveries of refrigerated carcasses, according to the report, are to be at the rate of 150 tons during July of 1947 and at the rate of 300 long tons per month thereafter during the life of the contract, which runs for 3 years unless mutually terminated before that time.

AUSTRALIA 1946-47 WCOL CLIP
SOLD AT HIGH PRICES

The National Council of Wool Selling Brokers of Australia announces that arrivals of wool at selling centers during the first 11 months of the 1946-47 season (July 1-May 31) totaled 870 million pounds, an increase of 4 percent above a year earlier. Approximately 7 million pounds represented wool of the 1945-46 season.

Sales during the first post-war auction season amounted to 815 million pounds for the first 11 months or 2 percent more than the quantity appraised a year earlier when the wartime purchase plan was still in effect. The total value of sales in 1946-47 represents approximately 280 million dollars compared with the appraised value of 173 million dollars in 1945-46. It is expected that an all time record value of 310 million dollars will be received for the total clip.

The average price of greasy wool reached 33.1 cents for the 11 month period compared with 21.2 cents a year earlier, an increase of 56 percent. The quantity still awaiting disposal at the end of May was 51 million pounds compared with 40 million pounds a year earlier.

Auctions for the 1947-48 season begin at Sydney September 1 and Adelaide September 2. Pre-Christmas offerings are expected to be about 420 million pounds, 54 percent at northern centers and the remainder at southern centers.

COTTON

EGYPT'S COTTON ACREAGE SLIGHTLY INCREASED

A preliminary official estimate places Egypt's 1947 cotton acreage at 1,302,000 acres, compared with a preliminary estimate for 1946 of 1,124,000 acres and a final estimate of 1,258,000.

Cotton leafworm infestation was general throughout the delta areas (about 1 million acres) by the end of May and considerable areas were affected in Middle Egypt. These attacks are reported to be among the heaviest ever experienced but effective control measures are expected to prevent any serious reduction in yields.

The final official cotton report for 1946, released on June 2, 1947, placed last year's crop at 6,065,736 kantars (1,252,000 bales of 500 pounds gross) from 1,258,000 acres. The production total included 373,000 bales with a staple length of 1-1/8 to 1-1/4 inches, 5,000 bales with 1-9/32 to 1-3/8 inch staple, 844,000 bales with a staple length of over 1-3/8 inches and 30,000 bales of unclassified cotton.

Cotton exports during the 10 months ended May 31, 1947, totaled 1,278,000 bales or 98 percent above the corresponding 10-month total of 645,000 bales in 1945-46. The principal destinations in 1946-47 were the United Kingdom 322,000 bales, Italy 231,000, India 226,000, France 127,000 and the United States 108,000. Exports to all these countries were considerably higher than for a similar period a year ago.

Local consumption during the first 10 months of the current season averaged about 18,000 bales monthly. Consumption and exports during the 9 months since Egypt's crop year began September 1, 1946, have exceeded the 1946 crop by 38,000 bales, representing that much reduction in the August 31 carryover of 1,614,000 bales.

Prices of Egyptian cotton have fluctuated within a narrow range of around 3.5 cents a pound during 1947 but the prices of Ashmouni and Zagora have weakened considerably in relation to those of Karnak and other extra long-staple varieties. This trend in price relationship is attributed largely to a sharp anticipated increase in production of the shorter staples this year as acreage planted to Karnak was restricted to about one-third of the area planted last year.

Stocks of cotton in Egypt at the end of May 1947 were reported at about 1,576,000 bales, a reduction of nearly 500,000 bales from the figure for a year ago. Exceptionally heavy exports of Karnak during May reduced stocks of that variety on June 5, 1947 to 957,000 bales, 592,000 of which were held by the Egyptian Government. Purchases by the Government from the 1946 crop amounted to less than 7,000 bales. Stocks of Ashmouni and Zagora on hand at that date amounted to 294,000 bales, 13,000 of which were in possession of the Government.

FRUITS, NUTS AND VEGETABLES (Continued from Page 49)

ITALIAN FILBERT FORECAST SMALLEST SINCE 1941

The 1947 preliminary forecast of filbert production in Italy is 12,100 short tons, unshelled basis, compared with 47,800 tons (revised) in 1946 and 15,700 tons (revised) in 1945. The forecast is 26 percent below the 5-year (1941-45) average of 16,400 tons, and 41 percent below the 10-year (1936-45) average of 20,400 tons.

In the Naples-Avellino district the forecast is for a crop of 7,700 tons, compared with the record high last year of 33,000 tons and 8,000 tons in 1945.

In this district the weather has been generally satisfactory but the all-time high production of last year has resulted in an off year. A few localities reported some adverse weather during pollination.

In Sicily the forecast is 4,400 tons, the smallest since 1933 when production totaled only 2,300 tons. A smaller crop was to be expected this season in view of the all-time high of 14,800 tons in 1946. Growing conditions have not been particularly unfavorable though some damage was done at flowering time by gales and low mists. The small crop is attributed more to exhaustion of the trees after the large crop of last year and to other factors other than weather. The insect Cimiciato has not been more destructive than normal according to preliminary reports. However, as the season advances it will be possible to better evaluate this damage.

It is still much too early to make definite statements relative to quality. Growers, however, feel that it will be about average in both districts. Ample farmer labor is available for harvest. In Sicily transportation problems, especially railroad cars, are causing some concern.

Estimates of carry-over stocks of 1946 filberts vary greatly, for the country as a whole, as the new crop approaches harvest. This is due, in part, to the present disorganized condition of the trade in this commodity and to lack of confidence in the currency. Growers of filberts prefer to hold their crops rather than take currency, and thus the quantity still in their hands is hard to estimate. After weighing all factors, it appears that an estimate of 9,300 short tons, unshelled basis, seems justified. The Naples-Avellino district is believed to have a possible 5,500 tons and the balance is in Sicily. In both districts the stocks are largely in the hands of growers and small speculators. The carry-over represents about 19 percent of the estimated 1946 output.

The 1946-47 marketing season now coming to a close, from an export viewpoint, was discouraging though domestic demand was unusually good. At the beginning of the season some optimism was expressed concerning exports. This, however, was soon replaced by pessimism when the price of Turkish filberts was lowered to levels below those in Italy. The strong demand from the oil crushers kept prices at high levels. Naples was able to export only limited quantities to European destinations and to the United States. Sicily fared only slightly better with exports reported being made to the Scandinavian countries, Canada, France, Switzerland, Australia, and Argentina. In recent weeks some interest has been shown by Denmark. It is now rumored that the British Ministry of Food may shortly enter the market, but that it will establish ceiling prices which may or may not be satisfactory to Italian exporters. The total export data for all Italy are not available but it is known to be considerably below a normal prewar total.

It is not possible to obtain reliable estimates of the tonnage utilized by oil crushers in both areas, but it is known to be large. One estimate indicates at least 1,100 short tons were used for this purpose in Sicily, but that a relatively large tonnage had been shipped to the mainland and may have found its way into oil mills. Filberts produced in the Naples-Avellino district are known to have moved into oil mills in large volume. Some idea of the volume may be had when one compares the estimate of stocks on hand on February 15 of 19,000 tons and the July 1 estimate of 9,300 tons. Exports are known to have been small so that the bulk of the 9,700 tons probably was utilized by oil mills and for direct consumption. Oil mills have kept prices at a high level almost constantly throughout the season.

The export market is at present at a standstill and exporters are unwilling to hazard a guess as to what price new-crop filberts will be offered. The key to the 1947-48 marketing season, as in the case of almonds, lies in the olive crop which is expected to be a good one. If the output of olive oil this season (starting in December) is better than that of the past two years fewer almonds and filberts will be utilized for oil, thereby freeing more for other outlets. The new-crop oil, however, will not be available for a few months, and it is assumed that the needs for oil will be met by carry-over almonds and filberts.

The short filbert crop and high prices, due to the inflation in the country, has led many exporters to feel that shipments abroad this season may again be small. The situation in Spain and Turkey when the market opens will be of considerable importance to the Italian exporters and will determine to a large extent whether they are able to export this season. Some exporters believe the increasing production in the United States will eventually further reduce the already small exports to that country.

FATS AND OILS

(Continued from Page 44)

June shipments of 36,000 tons, the lowest since May 1946, brought the total for the first 6 months of 1947 to 521,000 compared with 147,000 for the comparable period of 1946. The United States received 13,000 tons the past month, bringing receipts to 292,000 for January-June 1947 and 630,000 for the 12 months ended June 1947. In addition the United States imported 5,000 tons of coconut oil from the Philippines during January-May 1947.

The Philippines are now offering copra to the United States at \$142.50 to \$145.00 per ton c.i.f. Pacific coast compared with the high of \$255.00 early in April. The nominal buying price in Manila is 26 pesos per 100 kilograms (\$118 per ton) and in the producing areas 21 to 25 pesos (\$95 to \$113).

COTTON-PRICE
QUOTATIONS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices of certain foreign growths
and qualities in specific markets

Market location, kind, and quality	Date 1947	Unit of weight	Unit of currency	Price in: foreign: currency:	U.S. cents per pound	Equivalent currency:
Alexandria	:7-17:	Kantar	:	:	:	:
Ashmouni, Good.....	:	99.05 lbs.	Tallari	43.50	36.26	
Ashmouni, F.G.F.....	"	"	"	41.50	34.59	
Giza 7, Good.....	"	"	"	..	(not quoted)	
Giza 7, F.G.F.....	"	"	"	..	(not quoted)	
Karnak, Good.....	"	"	"	46.50	38.76	
Karnak, F.G.F.....	"	"	"	..	(not quoted)	
Bombay	:	Candy	:	:	:	:
Jarila, Fine.....	"	784 lbs.	Rupee	443.00	17.05	
Broach, Fine.....	"	"	"	543.00	20.90	
Sind American, Fine.....	"	"	"	541.00	20.82	
Punjab " 289-F, Fine:	"	"	"	636.00	24.47	
Kampala, East African....	"	"	"	920.00	35.40	
Buenos Aires	:	Metric ton	:	:	:	:
Type B.....	:7-19	2204.6 lbs.	Peso	2640.00	35.65	
Lima	:	Sp. quintal	:	:	:	
Tanguis, Type 5.....	"	101.4 lbs.	Sol	163.00	24.73	
Pima, Type 1.....	"	"	"	..	(not quoted)	
Recife	:	Arroba	:	:	:	
Mata, Type 5.....	:7-18	33.07 lbs.	Cruzeiro	110.00	18.10	
Sertac, Type 5.....	"	"	"	110.00	18.10	
Sao Paulo	:	:	:	:	:	
Sao Paulo, Type 5.....	"	"	"	155.50	25.58	
Torreon	:	Sp. quintal	:	:	:	
Middling, 15/16".....	"	101.4 lbs.	Peso	139.50	28.30	

Compiled from weekly cables from representatives abroad.